2024-25

CEREALS CANADA

Global Markets for Canadian Wheat

KEY INSIGHTS REPORT

Global Markets for Canadian Wheat: Key Insights Report

Canadian wheat holds a unique position in the international market due to its functionality and consistency. High-protein Canada Western Red Spring (CWRS) is valued in markets around the world as an improver wheat for blending with lower-protein wheats from other origins. Canada Western Amber Durum (CWAD) is favoured by producers of high-quality pasta and couscous due to its strong protein content, high semolina yield, and bright yellow colour. Canadian soft red winter wheats, primarily Canada Eastern Soft Red Winter (CESRW), are used to produce cookies, crackers, cakes, and other end-products that do not require high-protein content.

The versatility of Canadian wheat in a diverse range of end products has resulted in widespread global acceptance and steady demand in global markets. Alone, or blended with wheats of other types, Canadian wheat supports the production of high-volume pan breads, hearth and flat breads, pastries, cookies, crackers, noodles, pasta, and couscous in over eighty countries.

In this report is a snapshot of five markets that were part of the 2024 New Wheat Crop Trade and Technical Missions, plus the United States. Through continuous trade advocacy work, Cereals Canada provides ongoing programming and technical support for customers around the world.

Canada Continues to Solidify its Position as a Global Leader in High-Quality Grain Exports

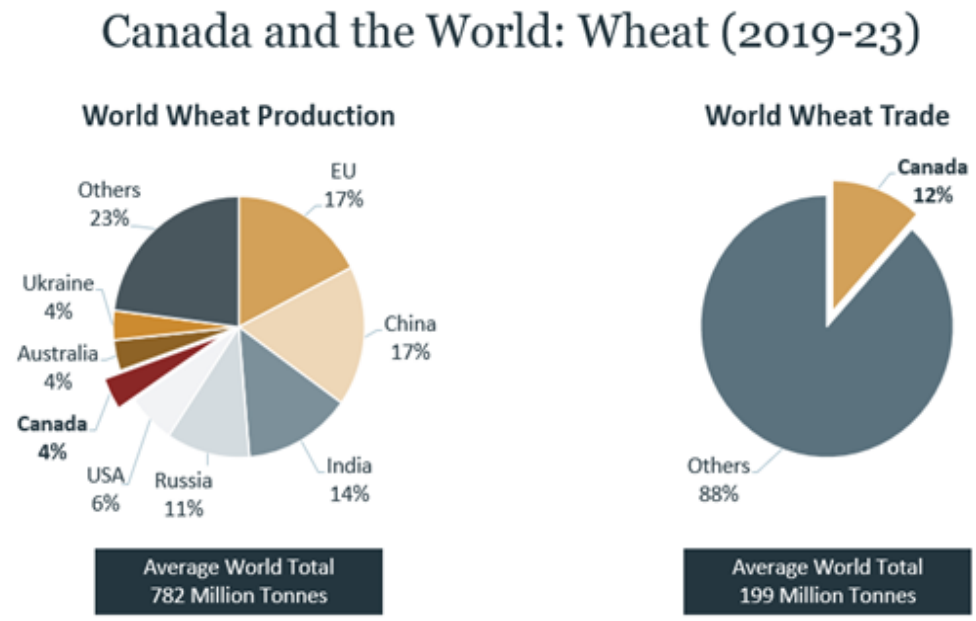
This past year, Canadian farmers grew nearly 35 million tonnes of high-quality wheat. The 2024 wheat crop is six percent larger than last year and nine percent larger than average, thanks to above-average yields for both non-durum wheat and durum wheat. Quality was excellent for all classes with a high proportion of the crop grading No. 2 or better.

Canadian Wheat Production by Class, in Metric Tonnes

	5-Year Average (2019-2023)	2023	2024	2024 Compared to 5-year Average
CWRS	20,063,071	20,893,764	21,950,411	+9%
Other Red Spring Wheat	2,982,048	3,786,291	3,324,081	+11%
CWAD	4,899,705	4,087,467	5,869,759	+20%
Winter Wheat	2,778,548	3,338,351	3,012,413	+8%
of which is Ontario	2,351,969	2,847,841	2,403,505	+2%
Other Wheat	899,676	835,994	795,316	-12%
Total Wheat	32,206,716	32,946,180	34,958,232	+9%

Source: Statistics Canada, December 2024

On average, Canada provides 12 percent of the wheat traded on the global market and is the main supplier of durum wheat, accounting for 53 percent of global durum wheat trade. Within the non-durum wheat segment, Canada primarily faces competition from the United States and Australia, which supply medium-protein and high-protein wheats to global markets. Key competitors for durum wheat include the European Union, United States, and Türkiye.



Source: International Grains Council, 2024

In the 2024-25 crop year, Canada is expected to export 26.2 million tonnes of wheat to over 80 countries, making us the world's third largest exporter of wheat and the top exporter of high-quality, high-protein wheat for the second consecutive year.

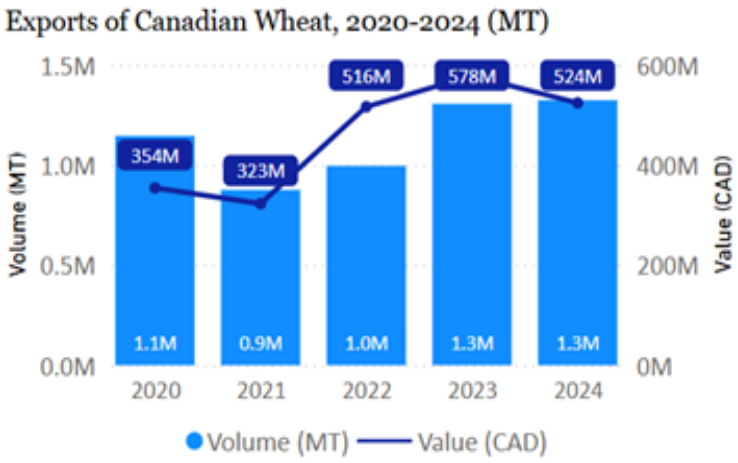
Technical Support

Cereals Canada is a trusted independent source of technical support to customers and others in the cereals value chain. Our staff have expertise in milling, analytical testing, and end-use functionality. Our technical experts support the value chain and customers of Canadian cereal grains.

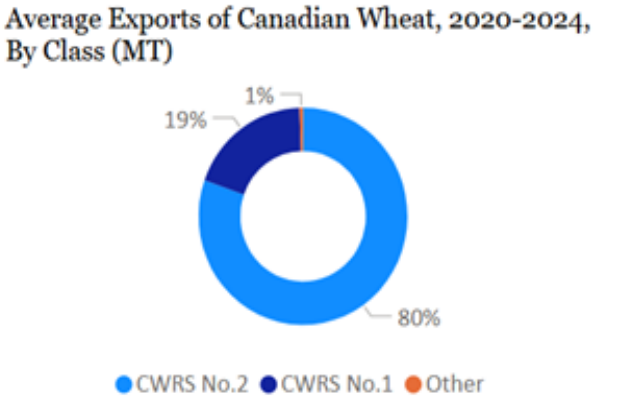
At Cereals Canada, we generate and analyze data that directly supports end-users in understanding the benefits of Canadian cereals and in making high-quality end-products. We also investigate and resolve milling and end product functionality issues that are identified by industry and customers.

Cereals Canada provides customized programs, training, and targeted technical support to customers of Canadian non-durum and durum wheat. These efforts ensure that customers understand the quality characteristics that are unique to Canadian non-durum and durum wheat and how to optimize the performance in milling and end product processing.

Bangladesh



Sources: Statistics Canada



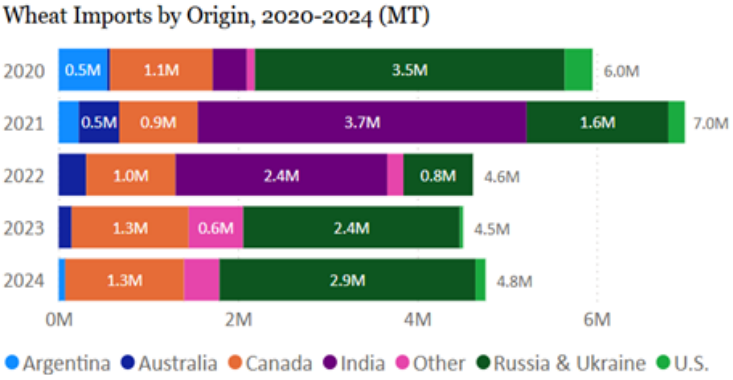
Sources: Canadian Grain Commission

Over the last five years, Canada exported 1.1 million tonnes of non-durum wheat to Bangladesh per year on average. This represents six percent of Canada's average annual non-durum wheat exports.

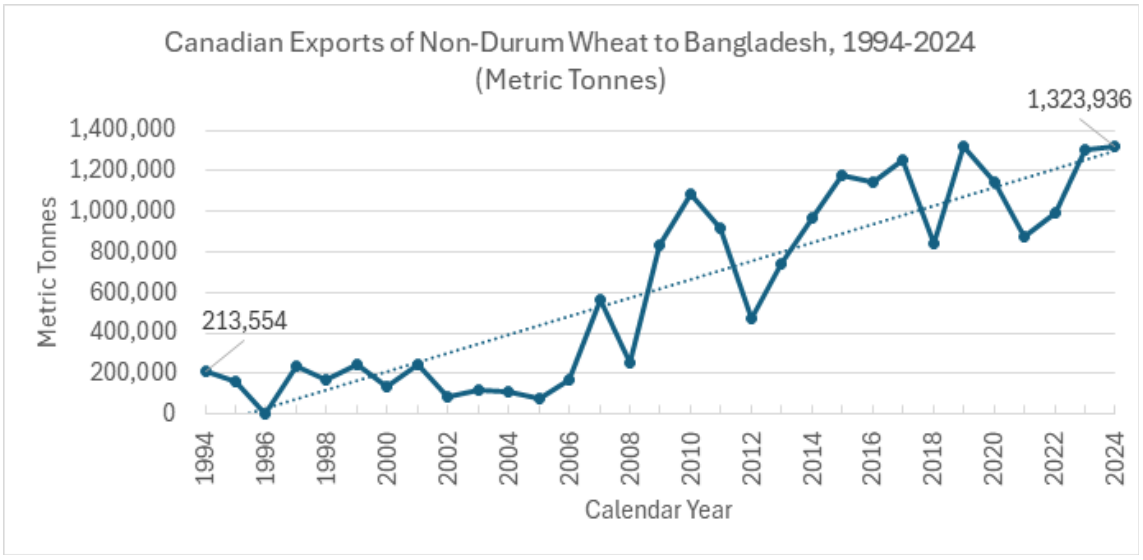
Bangladesh primarily imports No. 2 CWRS from Canada, which is used for blending with lower-protein wheat from other origins, such as Russia and Ukraine.

Bangladesh is a price-sensitive market and purchases large volumes of low-protein/low-cost wheat from various origins. Over the last five years, Bangladesh sourced 65 percent of its wheat imports from Russia, India, and Ukraine.

In 2024, Canadian non-durum wheat exports to Bangladesh reached their highest level in over 30 years.

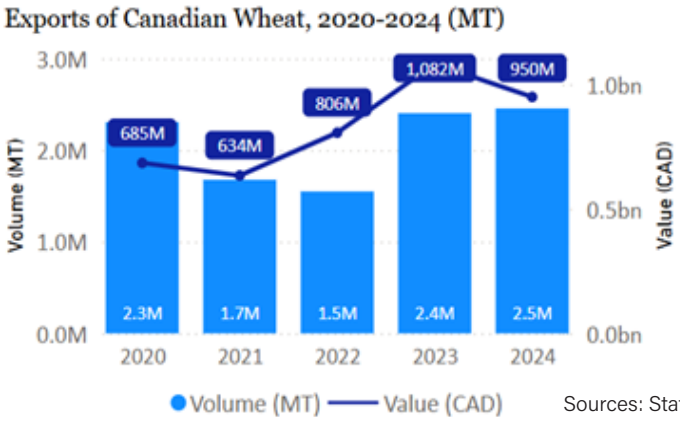


Sources: Statistics Canada, Global Trade Tracker, LSEG

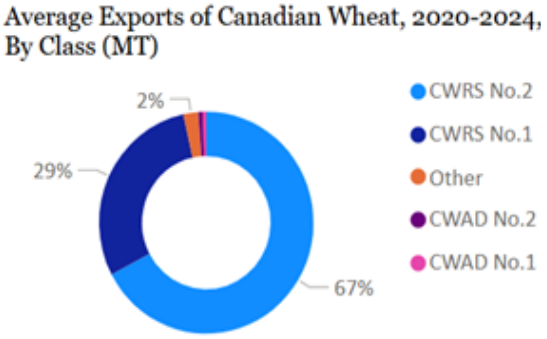


Source: Statistics Canada

Indonesia



Sources: Statistics Canada

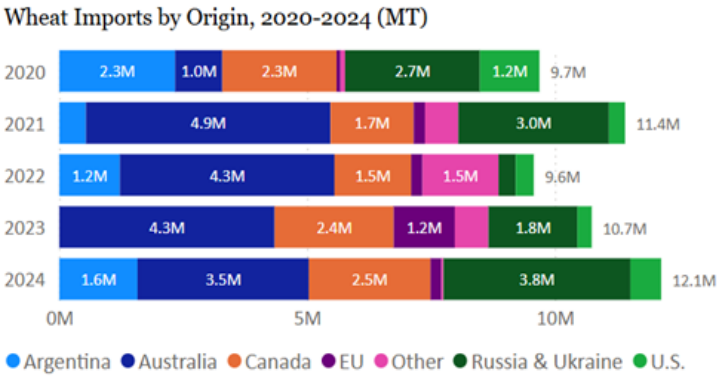


Sources: Canadian Grain Commission

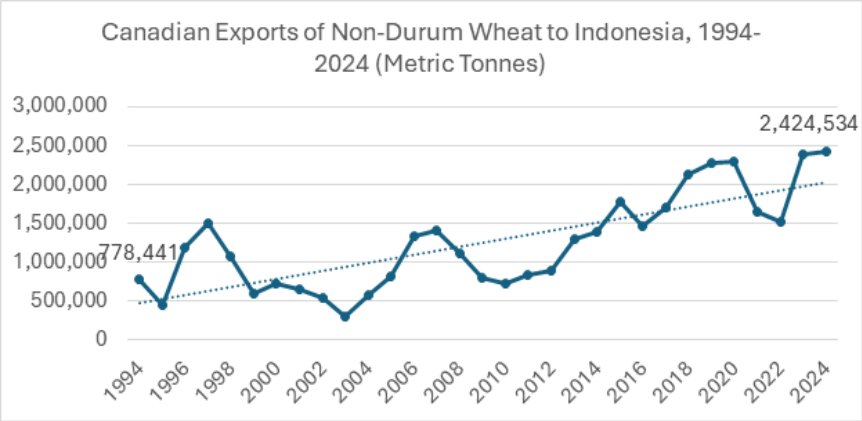
Indonesia is the second largest international market for Canadian non-durum wheat with imports over two million tonnes/year on average. This represents eleven percent of Canada's average non-durum wheat exports.

In 2024, Canadian non-durum wheat exports to Indonesia reached their highest level in over 30 years.

The Indonesian economy is the largest in Southeast Asia and is growing quickly.



Sources: Statistics Canada, Global Trade Tracker, LSEG



Source: Statistics Canada, 2025

Building Trade Relationships: Canada-Indonesia Comprehensive Economic Partnership Agreement (CEPA)

On December 2, 2024, Canada and Indonesia signed a joint statement announcing conclusion of negotiations for the agreement and committed to sign the CEPA in 2025. The forthcoming agreement is expected to establish opportunities for regulatory cooperation and underscores the overall positive trade environment between Canada and Indonesia.

Canada-ASEAN Free Trade Agreement

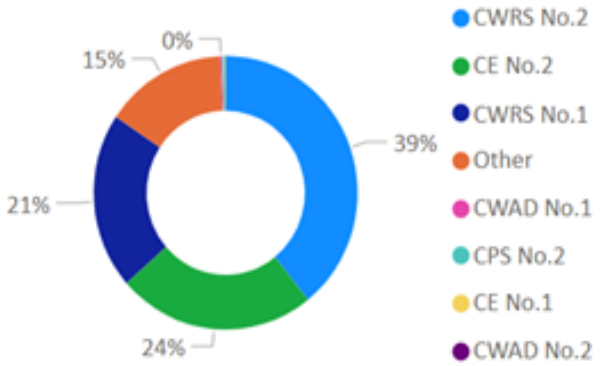
The Government of Canada is currently negotiating a free trade agreement with member countries of the Association of Southeast Asian Nations (ASEAN), of which Indonesia is a member.

Mexico

Exports of Canadian Wheat, 2020-2024 (MT)

Sources: Statistics Canada

Average Exports of Canadian Wheat, 2020-2024, By Class (MT)

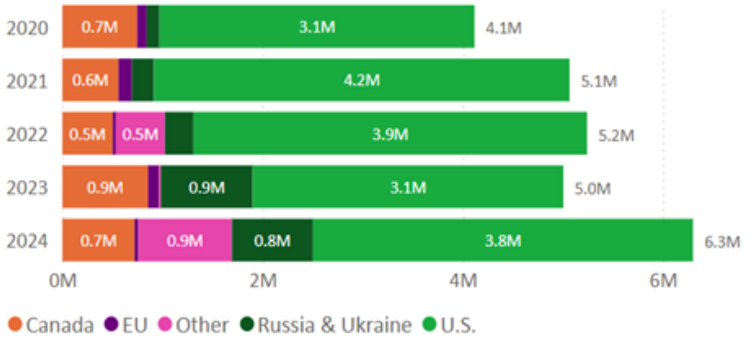


Sources: Canadian Grain Commission

On average, 60 percent of Canadian non-durum wheat exports to Mexico consist of CWRS, which is used in industrial bakery production and for blending with lower-protein wheat from other origins. Canada Eastern (CE) wheat accounts for about 24 percent of Mexico's wheat purchases from Canada, making Mexico the leading export destination for CE wheat.

Over the last five years, Canada exported 676,000 tonnes of non-durum wheat to Mexico on average per year. This represents four percent of Canada's average annual non-durum wheat exports.

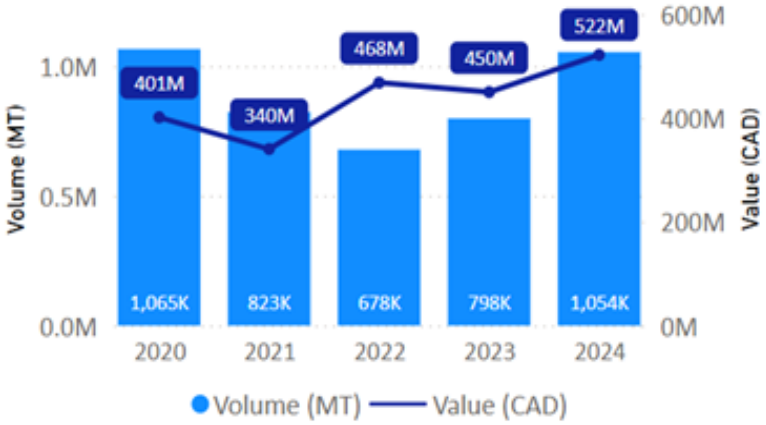
Wheat Imports by Origin, 2020-2024 (MT)



Sources: Statistics Canada, Global Trade Tracker, LSEG

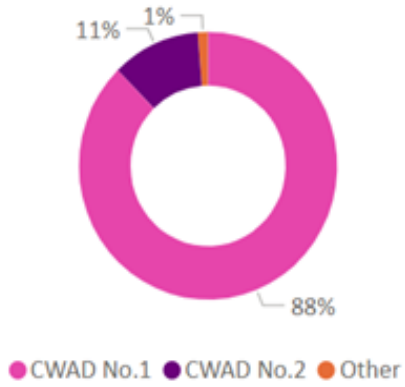
Morocco

Exports of Canadian Durum Wheat, 2020-2024 (MT)



Sources: Statistics Canada

Average Exports of Canadian Durum Wheat, 2020-2024, By Class (MT)

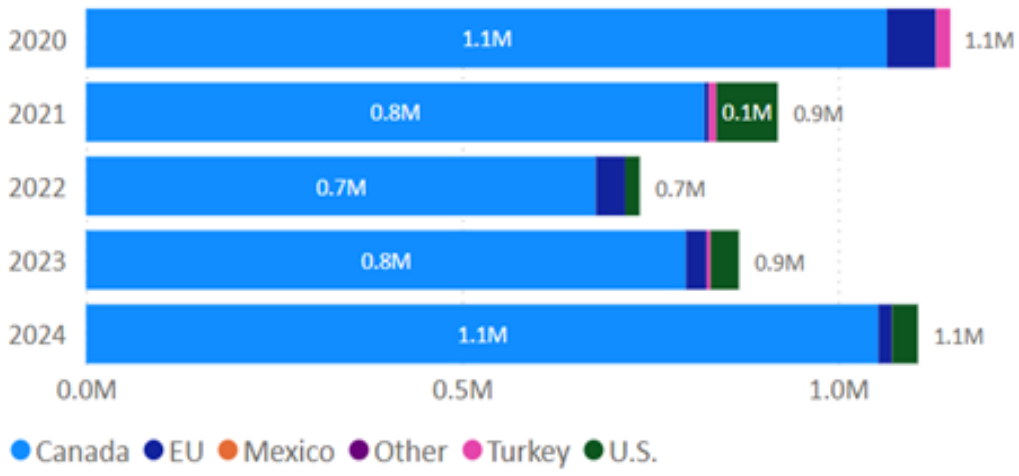


Sources: Canadian Grain Commission

Morocco is the second largest export market for Canadian durum wheat, accounting for 20 percent of Canada's average durum exports. A very quality-conscious market, Morocco primarily imports No. 1 CWAD from Canada.

Over the last five years, Canada dominated the Moroccan market for imported durum, holding an average market share of 92 percent.

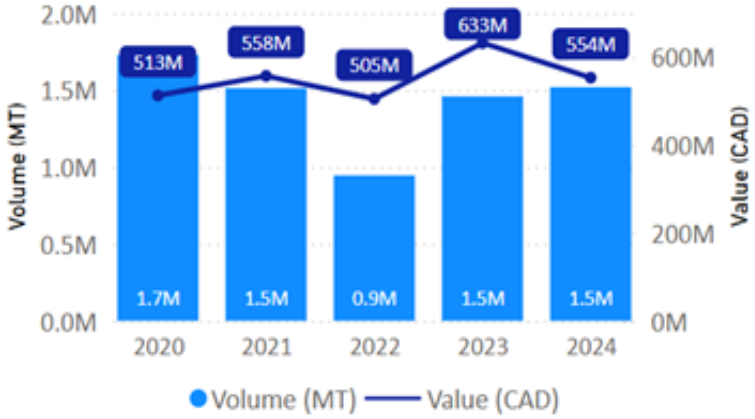
Durum Wheat Imports by Origin, 2020-2024 (MT)



Sources: Statistics Canada, Global Trade Tracker, LSEG

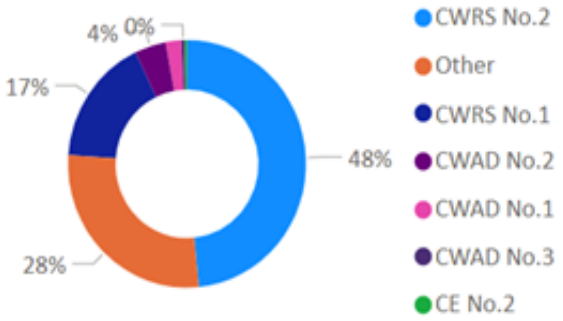
Peru

Exports of Canadian Wheat, 2020-2024 (MT)



Sources: Statistics Canada

Average Exports of Canadian Wheat, 2020-2024, By Class (MT)



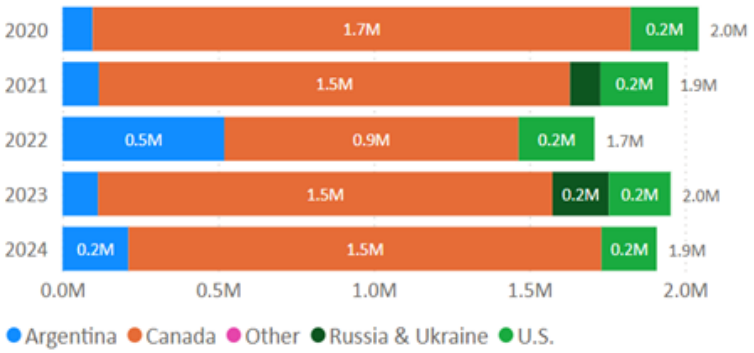
Sources: Canadian Grain Commission

Peru is the largest market for Canadian non-durum and durum wheat in the Latin America region.

Over the last five years, Canada exported 1.3 million tonnes of non-durum wheat to Peru on average per year. This represents seven percent of Canada's average non-durum wheat exports.

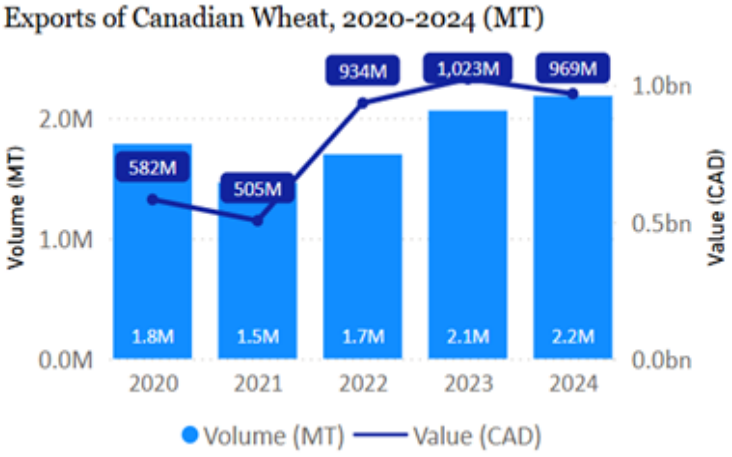
Over the last five years, Canada was the leading supplier of wheat to Peru with an average market share of 75 percent, followed by both Argentina and United States at 11 percent, respectively.

Wheat Imports by Origin, 2020-2024 (MT)



Sources: Statistics Canada, Global Trade Tracker, LSEG

United States



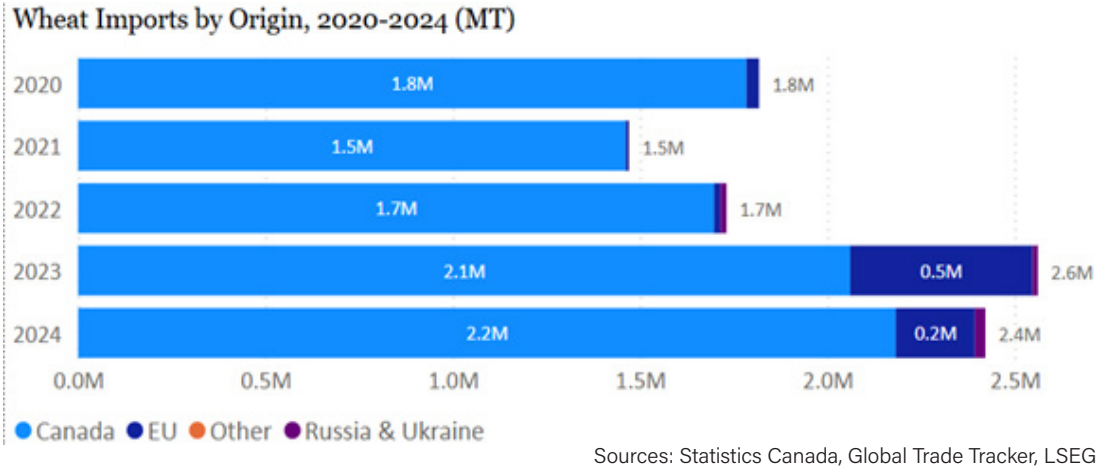
Sources: Statistics Canada

Over the last five years, the United States was the fourth largest export market for Canadian wheat. Although the United States is a key wheat producer and exporter, Canadian wheat is imported for blending with domestically grown wheat to obtain the required quality characteristics for a range of end products.

Canada Eastern Soft Red Winter (CESRW) has quality characteristics that are ideal for cookie and cracker production. CESRW is recognized by food manufacturers in the United States for its quality, cleanliness, and consistency.

On average, red spring wheat accounts for 41 percent of Canadian wheat exports to the United States, followed by durum wheat at 29 percent. The United States also purchases winter wheat and small amounts of soft white spring wheat from Canada. Canada is the largest source of wheat imports to US food processors as our supply chains have become more integrated and food products move back and forth between us. Canadian wheat is often used alongside US wheat to make high-quality foods that may be then exported back to Canada.

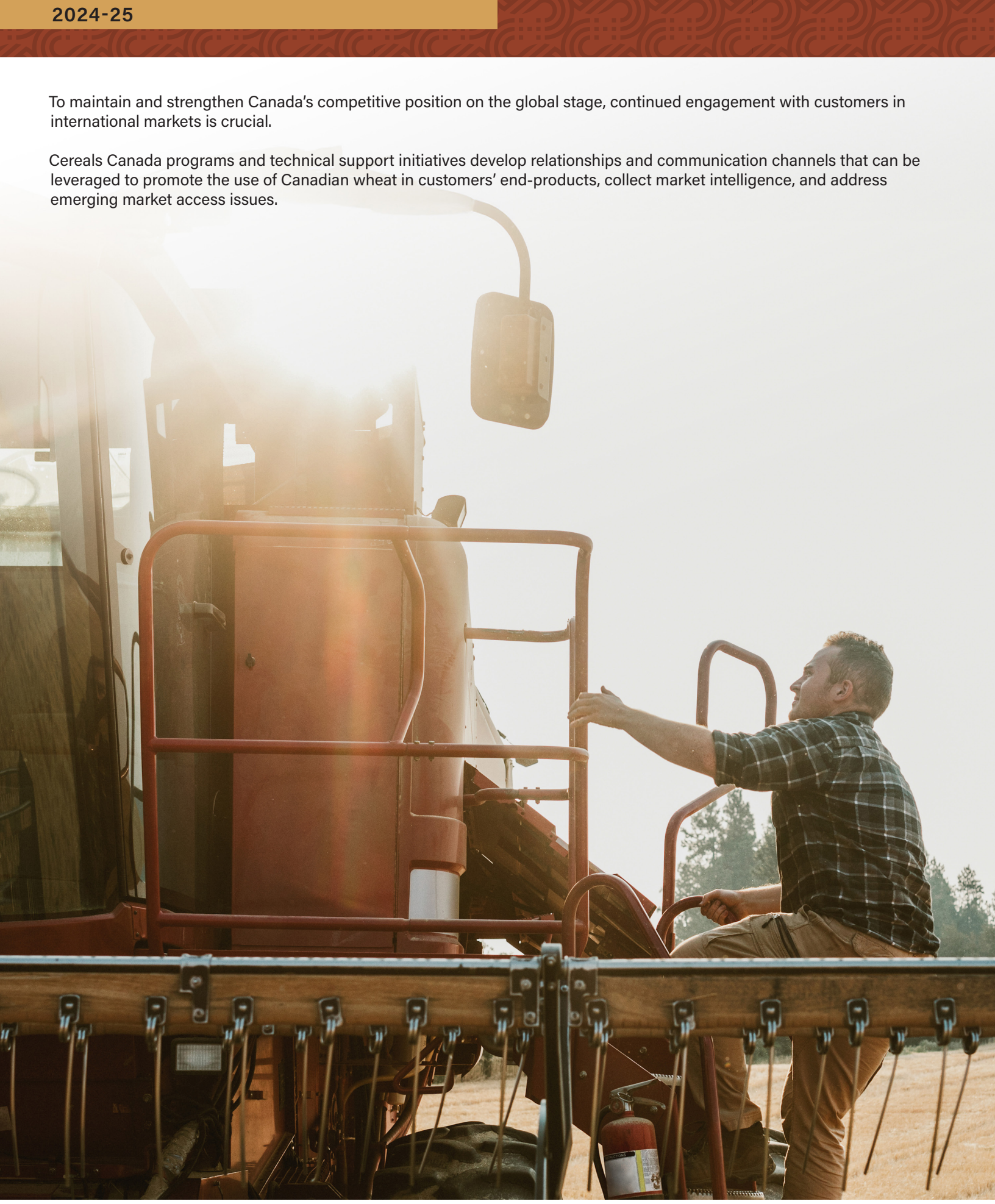
Canada benefits from established diplomatic ties and a robust rail logistics network. Canada's coast-to-coast rail networks operated by Canadian National Railway Co. (CN) and Canadian Pacific Kansas City Ltd. (CPKC) connect to the rail networks in the United States, facilitating cross-border movement of goods. On average, half of Canada's wheat exports to the United States are transported by rail.



Sources: Statistics Canada, Global Trade Tracker, LSEG

To maintain and strengthen Canada's competitive position on the global stage, continued engagement with customers in international markets is crucial.

Cereals Canada programs and technical support initiatives develop relationships and communication channels that can be leveraged to promote the use of Canadian wheat in customers' end-products, collect market intelligence, and address emerging market access issues.



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